

**Attorney Docket No. FINL-012/00US**

**PATENT**

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Date of Deposit: April 15, 2004

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By: Sherry Duncan Bitler  
Sherry Duncan Bitler

**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

In re application of C. VOS et al.

Confirmation No.: [Not Yet Assigned]

Serial No.: [Not Yet Assigned]

Examiner: [Not Yet Assigned]

Filed: [Concurrently Herewith]

Art Unit: [Not Yet Assigned]

FOR: METHOD AND APPARATUS FOR MANAGING CUSTOMER DATA

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Mail Stop Patent Application  
Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

**INFORMATION DISCLOSURE STATEMENT  
UNDER 37 C.F.R. §1.97(b)**

In accordance with the duty of disclosure set forth in 37 C.F.R. §1.56,  
Applicant(s) hereby submits the following information in conformance with 37 C.F.R.  
§§1.97 and 1.98.

- ☒ Pursuant to 37 C.F.R. §1.98, a copy of each document cited in the attached Form PTO/SB/08 is enclosed.
- ☐ No copies of the publications listed on the attached Form PTO/SB/08A are being provided pursuant to 37 C.F.R. §1.98(d) because the publications were previously cited by or submitted to the Office in prior Application Serial No. \_\_\_ to which the above-identified application claims priority under 35 U.S.C. §120.
- ☐ Publication(s) \_\_\_ listed on the attached Form PTO/SB/08A were cited in a foreign search or examination report corresponding to \_\_\_ application serial no. \_\_\_ and mailed on \_\_\_.

- ☐ Enclosed is a copy of a non-English publication(s) \_\_\_\_\_. Pursuant to §609 of the M.P.E.P., Applicant submits the attached foreign search or examination report, which cites such non-English language publication(s).
- ☐ Enclosed is a copy of a non-English publication(s) \_\_\_\_\_. English language publication \_\_\_\_ (copy enclosed) claims priority from this non-English publication.
- ☐ Enclosed is an explanation of non-English publication(s) \_\_\_\_\_ for which an English translation is not available.
- ☐ Enclosed is an English translation of non-English publication(s) \_\_\_\_\_ cited in the attached Form PTO/SB/08A.
- ☐ Enclosed is a copy of pending patent Application Serial No. \_\_\_\_\_.

This Information Disclosure Statement is filed within any one of the following time periods:

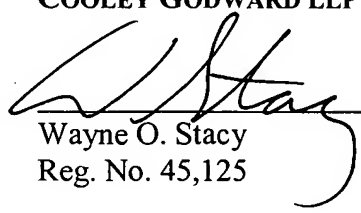
- ☒ within three months from the filing date of this national application other than a CPA under 37 C.F.R. § 1.53(d);
- ☐ within three months from the date of entry of the national stage as set forth in 37 C.F.R. §1.491 in this international application;
- ☐ before the mailing date of a first office action on the merits; or
- ☐ before the mailing of a first office action after the filing of a request for continued examination under 37 C.F.R. § 1.114.

It is respectfully requested that the Examiner consider the above-noted information and return an initialed copy of the attached Form PTO/SB/08A to the undersigned.

COOLEY GODWARD LLP  
ATTN: Patent Group  
One Freedom Square  
Reston Town Center  
11951 Freedom Drive  
Reston, VA 20190-5656  
Tel: (720) 566-4125  
Fax: (720) 566-4099

Respectfully submitted,  
COOLEY GODWARD LLP

By:

  
Wayne O. Stacy  
Reg. No. 45,125

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Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  <i>(use as many sheets as necessary)</i>				<b>Complete if Known</b>	
				Application Number	[Not Yet Available]
				Filing Date	[Concurrently Herewith]
				First Named Inventor	Vos et al.
				Group Art Unit	[Not Yet Available]
				Examiner Name	[Not Yet Available]
Sheet	1	of	5	Attorney Docket Number	FINL-012/00US

PTO/SB/08A (08-00)

U.S. PATENT DOCUMENTS					
Examiner Initials*	Cite No. <sup>1</sup>	U.S. Patent Document		Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY
		Number	Kind Code <sup>2</sup> (if known)		
		3,829,088		Pahlas	08/13/1974
		4,451,985		Pullman	06/05/1984
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<sup>1</sup> Unique citation designation number.

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		Number	Kind Code <sup>2</sup> (if known)		
		5,721,845		James et al.	02/24/1998
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		Office <sup>1</sup>	Number <sup>2</sup>	Kind Code <sup>3</sup> (if known)		
		EP	0 496 492 A1		Tomitsuka et al. / Sony Corporation	07/29/92
		EP	0 496 492 B1		Tomitsuka et al. / Sony Corporation	09/20/95
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		WO	98/32107		Padwa / Agent Based Curricula, Inc.	07/23/98
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		WO	99/01826		Business Evolution, Inc.	01/14/1999
		WO	00/29977		CCH Incorporated	05/25/2000

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<sup>1</sup> Enter Office that issued the document, by the two-letter code (WIPO Standard ST.3).

<sup>2</sup> For Japanese patent documents, the indication of the year of the reign of the Emperor must precede the serial number of the patent document.

<sup>3</sup> Kind of document by the appropriate symbols as indicated on the document under WIPO Standard ST. 16 if possible.

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OTHER PRIOR ART – NON PATENT LITERATURE DOCUMENTS			
Examiner Initials*	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
		A+dantage – Worldware, 1995, Jostens Learning Brochure	
		Applied Physics, 1995, EduStar America Inc. Brochure	
		Aqua Venture, 1995, EduStar America Inc. Brochure	
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		Fall, III, 1994, Authoring-Systems Software for Computer-Based Training (Educational Technology Publications, New Jersey) pp. 143-164	
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		Hibbard, Justin, (April 12, 1999), Assembly Online: The Web is changing mass production into mass customization, Information Week Online: News and Reviews (Online) Available Web Site: <a href="http://www.informationweek.com/729/build.htm">www.informationweek.com/729/build.htm</a> ; Accessed on: October 30, 2001	
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OTHER PRIOR ART – NON PATENT LITERATURE DOCUMENTS Cont'd			
Examiner Initials*	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
		Kulik et al., 1986, J. Educational Computing Research 2:235-252	
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		Pasik, Alexander J. (September 24, 1998), The Software Investor, <i>The Configuration Invasion</i>	
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		SageTalk: <i>Designing a Tool for Designing Successful Web-based Social Agents</i> (Paper ID 254); Conference '00, Month 1-2, 2000	
		Sherry and Komoski, eds., 1990, The IIS Report pp. 3-6, 21-24, 52, 256-260	
		Vaas, Lisa (May 17, 1999), <i>Service Sites Buckle Up Configurators</i> , PCWeek Online (Online) Available Web Site: <a href="http://www.zdnet.com/pcweek/stories/news/0,4153,402639,00.html">www.zdnet.com/pcweek/stories/news/0,4153,402639,00.html</a> ; Accessed on: October 30, 2001	
		Venezky and Osin, 1991, The Intelligent Design of Computer-Assisted Instruction (Longman, New York) chapters 3 and 7-13	
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		Poleretzky Z et al: "The Call Center & e-Commerce Convergence" Dialog ABI/Inform(R), XP002949410 2001	
		Attardi G et al: "Web-based Configuration Assistants" Artificial Intelligence for Engineering Design, Analysis and Manufacturing, London, GB, vol. 12, no. 4, September 1998 (1998-09) pages 321-331, XP002902516	

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